CHAPTER 5

OFFICER RECRUITING PRODUCTION AND MANAGEMENT SYSTEM (ORPMS)

SECTION 1

GENERAL

050101. **BACKGROUND.** The Officer Recruiter Production and Management System (ORPMS) is designed for the OPO to manage all available resources within the Navy Recruiting District to achieve goal. The OPO shall train and direct each OR in system use and monitor recruiter production weekly during the Officer Production Review (OPR). When used in conjunction with other available systems, ORPMS can effectively increase production and improve recruiter quality of life.

050102. **PURPOSE.** ORPMS provides production personnel with the tools necessary to effectively evaluate recruiting activities and achieve goal. The following sheets and logs shall be used by the recruiter.

050103. **GOAL ASSIGNMENTS AND APPOINTMENT.** Based upon the OPO's input, the NAVCRUITDIST CO will provide an Annual Officer Programs Goaling Letter (Exhibit 050201) to each OR. The NAVCRUITDIST CO and XO will review goal attainment progress with each OR on a quarterly basis and both the NAVCRUITDIST CO and OR will initial and date the bottom of the original letter for each quarter. NAVCRUITDIST changes made to the recruiter goaling letter will be via pen and ink, or addendum to the letter. Any change to the goaling letter will be approved by signature and date of either the NAVCRUITDIST CO or XO.

Note: Market factors and historical trends have demonstrated that proactive measures lead to mission success. Prospects should be identified within the first three quarters of the fiscal year with greater emphasis placed on the first two quarters.

050104. **REPORTS**

a. The following sheets and logs shall be used by the recruiter.

(1) Officer Prospecting Applicant Log (Exhibit 050202). This will be generated by the recruiter. During OPR, OPO will review log with OR to ensure ongoing and relevant activity. In addition to the current month's log, those for the last 12 months will be retained and available.

(2) Officer Production Analysis Training and Evaluation (OPATE). OPATE shall be used to analyze recruiter prospecting and sales performance (Exhibit 050203). Each recruiter shall

maintain a monthly OPATE based on a three month rolling period. Complete OPATE using data collected from the Planning Calendar and Prospecting Applicant Log. No later than the second working day of each month, the OPATE sheet will be updated with the previous month's data. During OPR, OPO will review OPATE with OR. In addition to the current month's OPATE, those for the last 24 months will be retained and available.

    b. The followings sheets and reports shall be used by the OPO:

        (1) <u>Navy Officer Recruiting Station (NORS) Assist Visit Checklist (Exhibit 050204)</u>. This checklist will be utilized by the OPO or Command District Trainer (CDT) when a NORS visit or training assist visit is performed, or if the production of a NORS is out of limits. Documented training will be conducted to target identified weaknesses and documentation will be placed in the OR's training jacket along with a copy of this checklist. During OPR, OPO will assess improvement of OR weaknesses and/or correction of discrepancies and schedule follow up training or visits as necessary. The OPO will maintain the original for 36 months.

        (2) <u>Officer Snapshot Report</u>. Migrated data contained in the Officer Snapshot Report (NAVCRUIT 1131/22) will identify all active and reserve program records with a "STATUS of APPLICANT", "SELECT", "NON-SELECT", "ACCESSION", or "DISPOSITION of DECLINE" for the current fiscal year. A copy of the Officer Snapshot will be **routed to the CO and XO and will be reviewed and initialed each month and retained by the OPO for two years.**

        (3) <u>Diversity Summary Report</u>. The Diversity Summary Report will identify all applicant records containing a race/ethnicity code other than Caucasian. It will contain, at a minimum, applicant name, program, race/ethnicity code, status and recruiting station identification number. It will be **routed to the CO and XO and will be reviewed and initialed each month and retained by the OPO for two years.**

        (4) <u>OTools Overdue Leads Status Report</u>. The Leads Status Report will provide the number of outstanding and overdue OTools leads delivered to the officer programs department. It will be **routed to the CO and XO and will be reviewed and initialed each month and retained by the OPO for two years.**

    c. <u>Officer Production Review (OPR) Report (NAVCRUIT 1131/23) (Exhibit 050205)</u>. It is essential to the success and development of assigned recruiters that the OPO conduct Officer Production Reviews. The OPR is designed to diagnose, plan and expedite improvements to sales skills, prospecting and processing procedures. OPRs should be scheduled in advance with each recruiter. Proper production review provides time to correct prospecting and processing short falls, enables the OPO to update the calendar, and identifies specific training needs.

(1) Bi-Weekly, the OPO and OR will conduct an OPR and all results will be documented on one monthly report. When practical, all OPRs will be conducted face-to-face. Individual NAVCRUITDIST geographic circumstances may require the majority of OPRs be conducted by phone. <u>The OPO, however, will ensure that one documented on-site face-to-face production review is conducted at the remote site for each remotely located officer recruiter per quarter</u>.

(2) Specific minimum required documented activities that will be accomplished as part of the OPR are as follows:

(a) Review the status of prospects and applicants on the applicant log.

(b) Analyze prospecting results against out-of-limits criteria, prescribed monthly recruiting activities listed in the MOP, and any outstanding POA&Ms.

(c) Analyze processing delays to established causes and determine corrective actions with the Lead Processor.

(d) Review the OPR to assess the level of progress being obtained by the individual recruiter in achieving their assigned goals.

(e) Provide PQS training and/ or train to identify individual recruiter weaknesses.

(f) Provide/recommend appropriate recognition/award and resolve administrative needs of the OR (leave, supply issues, etc.).

(3) At the completion of the OPR, the OPO and OR will sign and date the NAVCRUIT 1131/23. When the OR is remotely located, faxed signatures are acceptable. <u>The OPO will maintain the OPR reports for the duration of an OR's recruiting tour</u>.

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SECTION 2

OFFICER PRODUCTION ANALYSIS TRAINING AND EVALUATION (OPATE)

<u>050201</u>. <u>ABBREVIATIONS</u>

    a. <u>CON</u>. Contact: Person recruiter has spoken with who appears interested and qualified.

    b. <u>PRS</u>. Prospect: Person who has started the application process (taken test or returned paperwork, transcripts, etc.).

    c. <u>APP</u>. Applicant: Application has been submitted to NAVCRUITCOM and is awaiting board results.

    d. <u>ACC</u>. Accession: Applicant that has been final selected and sworn into the Navy (enlisted or commissioned).

    e. <u>CON-PRS</u>. Contact to Prospect ratio. This relationship indicates sales ability. Poor ratio may indicate lack of product knowledge and possible prospecting activity deficiencies.

    f. <u>PRS-APP</u>. Prospect to Applicant ratio. This relationship also indicates sales ability and ability to close. Poor ratio may indicate sales problems or recruiter inability to create sense of urgency for applicant to complete application.

    g. <u>APP-ACC</u>. Applicant to accession ratio. This relationship indicates number of kits actually selected and accessed. Poor ratio may indicate a lack of quality kits submitted, kitsmanship of the recruiter, or quality of prospecting being done.

Phone/Leads, Referrals, Personally Developed Contacts are same as enlisted PATE.

<u>050202</u>. **PRESENTATIONS.** Presentations should be judged on quality of sales presentation, ability to get audience, and return on investment for buying lunches. For example, a low CON number for presentations may indicate the recruiter is not giving a sufficient number of presentations or that the quality of the presentation could be improved. If the recruiter is giving enough quality presentations, it's possible that they are not getting a big audience for their presentations due to lack of advertising. This is vital in budgeting consideration. For example, if a recruiter is buying food for presentations and consistently has a significantly lower turnout than expected (i.e., he bought food for 30 and only five showed up), this may indicate lack of advertising or poor follow-through. Either way, it results in wasted funds and a poor return on investment. Given limited funding, OPOs should ensure that funds are spent on events with a good return on investment.

050203. **EMAIL.** Quality of email content, email output. Recruiters should be getting all Priority 1 and Priority 2 school name lists and professional name lists (state licensed doctors, dentists, nurses, engineers, etc.) at a minimum. A low CON number for email may indicate recruiters are not obtaining name lists, or that the content of the email is not good. Mass email campaigns are a quick, inexpensive and effective way to get the word out about Navy Officer Programs to a large target population. Email campaigns can sow seed and create awareness on a scale that is equal to if not greater than mail-outs at a much lower cost.

EXHIBIT 050201.   **ANNUAL OFFICER PROGRAMS GOALING LETTER**

Date _____
(NLT 1 OCT of current year)

From: Commanding Officer, Navy Recruiting District _____
To: _____
      (Officer Recruiter)

Subj: OFFICER RECRUITING REQUIREMENTS FOR FY____

1. The following accession goals are determined to be your contribution to NAVCRUITDIST _____ Officer Programs production for FY ____. (If actual goals are not available, utilize anticipated goals based on previous goals and estimated program changes).

Program	1st QTR Goal/Attn	2nd QTR Goal/Attn	3rd QTR Goal/Attn	4th QTR Goal/Attn	TOTAL Goal/Attn
_____	____ ____	____ ____	____ ____	____ ____	____ ____
_____	____ ____	____ ____	____ ____	____ ____	____ ____
_____	____ ____	____ ____	____ ____	____ ____	____ ____
_____	____ ____	____ ____	____ ____	____ ____	____ ____
Total	____ ____	____ ____	____ ____	____ ____	____ ____

2. I will personally review your progress quarterly. The Officer Programs Officer (OPO) will review your progress weekly during the Officer Recruiter Production Review. Additionally, prospecting emphasis will be discussed during each production review.

3. In order to ensure success, you must inform me, through the OPO, of any problems you encounter or foresee in obtaining your accession goals.

_____
Commanding Officer

EXHIBIT 050201. (P. 2) ANNUAL OFFICER PROGRAMS GOALING LETTER

Reviewed: (Initials & Date)

CO   _____/_____   _____/_____   _____/_____   _____/_____
       1st QTR   2nd QTR   3rd QTR   4th QTR

XO   _____/_____   _____/_____   _____/_____   _____/_____
       1st QTR   2nd QTR   3rd QTR   4th QTR

OPO _____/_____   _____/_____   _____/_____   _____/_____
       1st QTR   2nd QTR   3rd QTR   4th QTR

OR   _____/_____   _____/_____   _____/_____   _____/_____
       1st QTR   2nd QTR   3rd QTR   4th QTR

Distribution:
OR Training Jacket /OPO

EXHIBIT 050202.   OFFICER PROSPECTING APPLICANT LOG

OFFICER PROSPECTING APPLICANT LOG

NORS STATION: RECRUITER: MONTH/YEAR: Page 1 of ___

Name (Last, FI, MI) Last four of SSN, ZIP / EMAIL ADDRESS / Cell/Home Phone #	APPT Date	INTV Date	INTV Code	Program CODE(S) / Degree / GPA	GENOF MEDICAL	ACT RES	AGE Sex / Race	TEST DATE / SCORES	PHO/COM DOCS	OTOOLS STATUS	PRO REC	PFA (pass/fail)	HT WT	PHYSICAL PASS	PHYSICAL FAIL	WVR	JPAS SENT	SELECT PO/LETTER	OCS/ODS DATE	DISPO / REMARKS
INEBACK, C.A. 503 43056 CALINE@GO.NAVY 380-555-5555	19-Mar-09	19-Mar-09	RI	3100116001370 0 BASKET/3.98	X N/A	X N/A	26 M Y	X 3-19 35111	X	X AT NRC	31000 11600	PASS	72 167	P		N/A	25-Mar-09	31000 16000 25-Mar-09	OCS 15-Jun-09	GOOD TO GO, READY TO SHIP

TOTALS:

I CODE
H PHONE
L LOCAL LEAD
N NATIONAL LEAD
D COLLEGIATE REFERRAL
A APPLICANT REFERRAL
C COI/COUNSELOR
S REFERRAL OTHER SERVICE
D PERSONALLY DEVELOPED CONTACT
P PRESENTATION/HARP/SEMINAR
I WALK IN
R Recruiter Refferral
N Pro Navy

Disposition Codes
AFF Affiliation
C/O Carry Over
DECL Decline to enlist
DEP Delayed Entry Program
DIR Direct Ship
ENL Enlistment/Commission
EOS Enlisted other service/Referred

NBQ Not BEERS Qualified
NME Not Morally Qualified
NMQ Not Mentally Qualified
PMR Permanently Medically Rejected
QNE Qualified, Not Enlisted
TMR Temporary Medically Rejected

Waiver Codes & Authority
1 Re-Code
2 Dependency
3 Accession
4 Medical
5 Civil
6 Drug/Alcohol
7 SCROLL

N - NRD
R - REGION
C - CNRC
P - PERS
B- BUMED
G - GRADE

Exhibit 050203. OFFICER PRODUCTION ANALYSIS TRAINING and EVALUATION (OPATE)

MUST BE MAINTAINED FOR 24 MONTHS

OFFICER PRODUCTION ANALYSIS TRAINING and EVALUATION (OPATE)

MONTH _____   RCTR/NORS _____

SECTION I PROSPECTING GENERATED

PHONE/LEADS

MONTH	CON	PRS	APP	ACC
JUL	11	7	1	1
AUG	12	8	1	0
SEP	11	7	3	2
Totals	34	22	5	3

REFERRALS
(RR, RA, RC, RD, RI, RS, PN)

MONTH	CON	PRS	APP	ACC
JUL	2	1	0	0
AUG	2	0	0	0
SEP	1	1	1	1
Totals	5	2	1	1

PERSONALLY DEVELOPED
CONTACTS

MONTH	CON	PRS	APP	ACC
JUL	7	4	1	1
AUG	8	4	1	1
SEP	9	5	0	0
Totals	24	13	2	2

PRESENTATIONS

MONTH	CON	PRS	APP	ACC
JUL	7	4	1	1
AUG	8	4	1	1
SEP	9	5	0	0
Totals	24	13	2	2

EMAIL

MONTH	CON	PRS	APP	ACC
JUL	7	4	1	1
AUG	8	4	1	1
SEP	9	5	0	0
Totals	24	13	2	2

SECTION II PROSPECTING SUMMARY (Ratios for 1 Accession)

PHONE/LEADS

	CON	PRS	APP	ACC
REQ'D FOR 1 PH ACC	11.3	7.3	1.7	1

REFFERALS
(RR, RA, RC, RD, RI, RS, PN)

	CON	PRS	APP	ACC
REQ'D FOR 1 RF ACC	5.0	2.0	1.0	1

PERSONALLY DEVELOPED
CONTACTS

	CON	PRS	APP	ACC
REQ'D FOR 1 PD ACC	12.0	6.5	1.0	1

PRESENTATIONS   **EMAIL**

REQ'D FOR 1 PR ACC	CON	PRS	APP	ACC
	12.0	6.5	1.0	1

REQ'D FOR 1 EM ACC	CON	PRS	APP	ACC
	12.0	6.5	1.0	1

SECTION III PROSPECTING PLAN GUIDANCE

A. Quarterly Goal

3
ACC Total

Quarterly Goal by	0	1	0	1	1	
Source Code	**PH**	**RF**	**PD**	**PR**	**EM**	

B. Total Monthly Activity Required To Achieve Goal (Used to build Prospecting Plan)

CONTACTS	PROSPECTS	APPLICANTS	ACCESSIONS
5.0	2.0	.01	1.0

SECTION IV OTHER ACTIVITY

MAIL OUTS AND WALK-INS

MONTH	PRS	ACC
JUL	2	0
AUG	3	1
SEP	0	0
Totals	5	1

RECRUITER SIGN: _____

OPO SIGN: _____ DATE: _____

050204. **NAVY OFFICER RECRUITING STATION (NORS) ASSIT VISIT CHECKLIST**

<table>
<tr><td colspan="2" align="center">TRAINING</td></tr>
<tr><td>Is there evidence of regular station visits by the CO, XO, OPO or CR?</td><td>_____</td></tr>
<tr><td>Does each recruiter have an annual goaling letter signed by the CO?</td><td>_____</td></tr>
<tr><td>Have all recruiters completed their Command Indoctrination?</td><td>_____</td></tr>
<tr><td>Have all recruiters completed their Station Indoctrination?</td><td>_____</td></tr>
<tr><td>Is there evidence of recruiter PQS training and are they on schedule?</td><td>_____</td></tr>
<tr><td>Are Formal / GMT training planned and documented?</td><td>_____</td></tr>
<tr><td>Is OJT and Follow up training being performed and documented?</td><td>_____</td></tr>
<tr><td>Have the medical recruiters completed MEDCRUIT II?</td><td>_____</td></tr>
<tr><td colspan="2">Comments:</td></tr>
<tr><td colspan="2" align="center">LEADERSHIP AND MANAGEMENT</td></tr>
<tr><td>How many overdue leads are there?</td><td>_____</td></tr>
<tr><td>How many unassigned leads are there?</td><td>_____</td></tr>
<tr><td>Are all Recruiter leads contacted within 72 hours?</td><td>_____</td></tr>
<tr><td>Is there sufficient documentation in OTOOLS that reflect a proper disposition of a LEAD and a minimum of 3 attempts were executed?</td><td>_____</td></tr>
<tr><td>Is the LEAD feedback information to the LPTS completed within 30 days of receipt of the OAMS record?</td><td>_____</td></tr>
<tr><td>What is the LEAD conversion rate for Local Leads?</td><td>_____</td></tr>
<tr><td>What is the LEAD conversion rate of National Leads?</td><td>_____</td></tr>
<tr><td colspan="2">Comments:</td></tr>
</table>

050204. (P.2) NAVY OFFICER RECRUITING STATION (NORS) ASSIT VISIT CHECKLIST

TRAINING

Is there evidence of regular station visits by the CO, XO, OPO or CR? _____

Does each recruiter have an annual goaling letter signed by the CO? _____

Have all recruiters completed their Command Indoctrination? _____

Have all recruiters completed their Station Indoctrination? _____

Is there evidence of recruiter PQS training and are they on schedule? _____

Are Formal / GMT training planned and documented? _____

Is OJT and Follow up training being performed and documented? _____

Have the medical recruiters completed MEDCRUIT II? _____

Comments:

LEADERSHIP AND MANAGEMENT

How many overdue leads are there? _____

How many unassigned leads are there? _____

Are all Recruiter leads contacted within 72 hours? _____

Is there sufficient documentation in OTOOLS that reflect a proper disposition of a LEAD and a minimum of 3 attempts were executed? _____

Is the LEAD feedback information to the LPTS completed within 30 days of receipt of the OAMS record? _____

What is the LEAD conversion rate for Local Leads? _____

What is the LEAD conversion rate of National Leads? _____

Comments:

050204. **(P. 3) NAVY OFFICER RECRUITING STATION (NORS) ASSIT VISIT CHECKLIST**

OVERALL SUMMARY
Strengths
Weakness
Training Conducted

_____   4/13/09   _____   4/13/09
Trainer   **NORS Commander**

EXHIBIT 050205. OFFICER PRODUCTION REVIEW (OPR) REPORT (NAVCRUIT 1131/23)

OFFICER PRODUCTION MONTHLY REVIEW REPORT

(To be conducted bi-weekly using this form)

NAVCRUITDIST: _____   Officer Program: _____

Production Review for: _____

Month Conducted: _____

To be filled out on First Review Each Month:

Program: (i.e. HPSP)   _____ _____ _____ _____ _____

Assigned Goal   _____ _____ _____ _____ _____

Accessions   _____ _____ _____ _____ _____

Selects   _____ _____ _____ _____ _____

Non-Selects/Declines   _____ _____ _____ _____ _____

Kits at NAVCRUITCOM   _____ _____ _____ _____ _____

Prospects in Progress   _____ _____ _____ _____ _____

COIs Contacted   _____ _____ _____ _____ _____

See MOP for Priority 1 and 2 Schools Assigned.

Priority 1 Schools Visited:

University: Event or Action Taken: Post Visit Report
                                                                        Completed:

_____   _____   ☐ YES ☐ NO

_____   _____   ☐ YES ☐ NO

_____   _____   ☐ YES ☐ NO

COI developed/Contact Name: _____

Priority 2 Schools Visited:

University: Event or Action Taken: Post Visit Report
                                                                        Completed:

_____   _____   ☐ YES ☐ NO

_____   _____   ☐ YES ☐ NO

_____   _____   ☐ YES ☐ NO

COI developed/Contact Name: _____

Recruiting events other than school visits:
(MOP should reflect listed events or events
will be added to MOP)   _____

NAVCRUIT 1131/23 (Rev 10/09)   Page 1 of 2

EXHIBIT 050205. (P. 2) - OFFICER PRODUCTION REVIEW (OPR) REPORT (NAVCRUIT 1131/23)

<u>Notes/Concentration Areas</u>

To be filled out on first/second review:

Last required monthly PSS sales call conducted
on current NRC form and placed in training
binder: _____

PQS status (must be completed within 6 months
or 3 month waiver granted). % completed.   _____

Is goaled area out-of-limit per MOP   _____

If yes, additional marketing/prospecting assigned:

Additional training recommended: i.e. Program
Requirements, Sales, OTools, Kit Management,
Ride-along, Prospecting, etc   _____

Was additional training documented on an OJT form and placed in training binder? _____

Number of Recruiter New LEADS in OTools for this recruiter:

_____First Review   _____Second Review

Any administrative needs addressed:

OPE spent last month: _____

First review

Date: _____

_____   _____
            OPO's Signature   OR's Signature

Second review

Date: _____

_____   _____
            OPO's Signature   OR's Signature

Maintain for Recruiter's Entire Time at NAVCRUITDIST!!

NAVCRUIT 1131/23 (Rev 10/09)   Page 2 of 2